

# CUSTOMER SERVICE REPRESENTATIVE ROLE

## Role Summary

The Customer Service Representative Role consists of three grade levels (11-12 and grade 13 leadworker). Incumbents are the primary contact for internal and external customers to determine needs and resolve problems regarding all tax and licensing processes within the department. Incumbents resolve approximately 80% of all inquiries. Primary contacts are with internal and external customers, taxpayer representatives, tax professionals, division administrator, bureau chiefs, unit managers, information technology staff, and tax specialists.

## Working Conditions

Situations encountered may be high pressure, confrontational, and verbally combative. Ability to work in an office setting with noise distractions. Considerable time is spent on the phone and at a computer terminal.

## Education and Experience

- Grade 11: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation; post-secondary coursework in business administration including taxation or related field; experience in customer service; and investigation, auditing, or collection work. Other combinations of education and experience will be evaluated on an individual basis.
- Grade 12: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and post-secondary coursework in business administration including taxation or related field; one year of experience in customer service; investigation, auditing, or collection work; and six months of experience in interpreting and applying Montana rules and regulations. Other combinations of education and experience will be evaluated on an individual basis.

## Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.

- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.
- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

## Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

### All Customer Service Representatives answer inquiries relating to the follow tax types and revenue sources:

Old Fund Liability Tax	Accommodations Tax	Payroll Tax
Cigarette Licensing	Tobacco Products Tax	Cigarette Tax
Contractor's Gross Receipts	Emergency Telephone	Telecommunications
Recreational Vehicles Fee	Nursing Facilities Fee	Liquor Licensing
Corporation License Tax	Natural Resource Taxes	Telephone License
Property Tax	One Stop Licensing	Inheritance Tax
Consumer Counsel	Public Service Commission	Withholding Tax
Accounts Receivable	Individual Income Tax	Unclaimed Property
Centrally Assessed Taxes	Rural Electric and Telephone Coop	

## Grade 11

### Predominant/Essential Duties

- Assist internal and external customers with taxation and licensing requirements.
- Conduct research and analysis to resolve customer inquiries by interviewing customers and gathering multiple and appropriate facts regarding tax filing, registration, licensing, or any other area the customer requires.
- Monitor and update taxpayer accounts and records in the department information systems to provide the latest and most accurate information to all processes.
- Resolve audit discrepancies regarding tax assessments, credits, or other issues by researching the taxpayer's records.
- Resolve customer problems with registration and licensing as appropriate.
- Upon registration, notify the customer if a delinquency exists and request payment.
- Responsible for compliance and enforcement of statutes and regulations.
- Assist customers in filing returns for all tax types, including deadlines, deficiencies, taxable income, and allowable deductions.
- Advise businesses of all tax responsibilities.

## **Grade 12**

### **Predominant/Essential Duties**

- Explain meaning and intent of tax statutes, related law case law, and administrative rules. Educate customers on the proper methods and procedures based on federal and Montana laws, rules, and regulations.
- Compile the nature and type of issues for trends and recommend solutions.
- Determine precedent setting or extraordinarily technical questions and when necessary, refer to appropriate sources, taking ownership in assisting with a timely response.
- Determine whether to award licenses from various state government agencies to customers.
- Act as taxpayer advocate by utilizing extensive knowledge of all tax laws, payroll accounting, office auditing techniques, and available electronic resources to provide overall tax service to customers.
- Assist customers in filing returns for all tax types, including filing deadlines, filing deficiencies, taxable income, and allowable deductions.
- Advise businesses of all tax responsibilities.

## **Grade 13**

### **Predominant/Essential Duties**

- Leadworker for Call Center staff.
- Primary contact for the Call Center for all the department tax types and revenue sources and functions as the communication link with team members, specialists, unit managers, bureau chiefs, and external customers.
- Assist bureau chief in implementing the work plan.
- Ensure staff are fully informed of, and regularly discuss/resolve, issues. Facilitate issue resolution.
- Responsible for continuous, adequate coverage for the Call Center.
- Make recommendations to bureau chief on resource allocation.
- Responsible for adequate training for the entire Call Center (includes identifying areas needed for training, reserving tax experts to provide the training, development and updating of learning).
- Provide recommendations to bureau chief for enhancing Call Center's customer service.

## **Competencies and Degrees of Proficiency**

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

## Competency/Proficiency Chart - Customer Service Representative Role

Competencies	Grade 11 Under Guidance	Grade 12 Minimal Guidance	Grade 13 Minimal Guidance
Demonstrated skill and ability to work on multiple tasks.	A	C	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	A	B	B
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role.	B	C	C
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	B	B	C
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	B	C	C
Demonstrated knowledge and ability in negotiation techniques relative to the role.	A	B	B
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	B	C	C
Demonstrated analytical skills relative to the role.	A	B	B
Demonstrated research skill relative to the role.	A	B	C
Demonstrated knowledge of individual tax types and their relationships within the organization.	B	C	C
Demonstrated knowledge of specific revenue sources and market trends.	A	B	B
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions, and results. Follow issues through to completion.	B	C	C

### **Degree of Proficiency**

**A:** A degree of knowledge, skill or ability commensurate with elementary-level tasks and assignments.

**B:** A degree of knowledge, skill or ability commensurate with intermediate-level tasks and assignments.

**C:** A degree of knowledge, skill or ability commensurate with advanced-level tasks and assignments.

**D:** An advanced degree of knowledge, skill or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

**E:** The most advanced degree of knowledge, skill or ability evidencing complete mastery and understanding of the subject.